



Office Puzzle

A PRACTICAL, STEP-BY-STEP GUIDE

How to Switch ABA Practice Management Platforms

Evaluate, prepare, and successfully transition to a better solution without disrupting client care.

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INTRODUCTION

Is your current platform holding you back?

Switching ABA practice management platforms can feel overwhelming, but staying with a system that slows your team down is far more costly over time.

Whether you're:

- Juggling manual spreadsheets and paper
- Using multiple disconnected tools, or
- Managing an all-in-one system that isn't delivering



This guide will walk you through how to **EVALUATE, PREPARE, AND SUCCESSFULLY TRANSITION** to a better solution, without disrupting client care.

Simplify your ABA operations today!

Schedule a demo or start your free 30-day guided trial.

GET STARTED

No credit card required

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Understanding Your Options

ABA PRACTICE MANAGEMENT OPTIONS

Two Paths for Managing Your Practice

ABA Practices typically have two paths when it comes to managing their operations via software

1 Using multiple specialized tools

Some practices piece together separate systems for scheduling, billing, data collection, and documentation, selecting 'best-in-class' tools for each function.

This often has hidden costs:

Time: Staff must switch between systems & duplicate data entry

Energy: Increased training and troubleshooting across platforms

Financial Impact: Multiple subscriptions and integration tools add up quickly

Risk of errors: Disconnected systems can lead to inconsistencies in scheduling, billing, and clinical records

2 Using an all-in-one ABA platform

Most ABA practices lean toward a unified, all-in-one platform that brings everything into a single system.

This approach allows you to:

- Manage operations from one centralized dashboard
- Reduce manual work
- Improve accuracy across scheduling, data collection, and billing
- Streamline staff training and onboarding

Which approach is right for your practice?

You don't have to choose an all-in-one platform. But, it's important to keep in mind that as practices grow, managing multiple disconnected tools often becomes unsustainable.

For practices prioritizing **SCALABILITY AND EASE OF USE** an all-in-one platform is often the most practical and sustainable choice.

For most teams, the decision comes down to these factors:

Will learning and managing multiple tools really work for your team in the long-run?

Will you have more efficiency with a single, streamlined system?

WHAT IS AN ALL-IN-ONE ABA PLATFORM?

One System. Every Function.

An all-in-one ABA practice management platform centralizes your operations into a single system, typically including:


- Scheduling
- Billing & claims
- Payroll
- Clinical data collection
- Reporting & analytics
- Staff management

Why it's beneficial

- **Reduces errors** by eliminating duplicate entry
- **Saves time** across admin and clinical teams
- **Improves visibility** into operations and performance
- **Scales with your practice** without adding complexity
- **Faster onboarding and training** with one unified system
- **Includes all features for all roles** on your team

How to tell if a platform is truly all-in-one

Some solutions claim to be all-in-one, when they're really just separate products bundled together with price tags that add up fast. A unified solution should include everything you need to run your practice smoothly and efficiently.



Pay attention to how products are listed: if you aren't getting access to the entire platform and all its features, then you're not getting an all-in-one solution.

“Everything included” means no tiers or anything that needs to be unlocked—you should have all of the tools you need regardless of your practice size.



Evaluating & Selecting a Platform

EVALUATING ABA SOFTWARE SOLUTIONS

Step 1: Assess Your Current System

Conducting a quick audit of your current practice management system will give you a clear picture of what's working and what needs to change so you can confidently evaluate new platforms.

SYSTEMS

- How many tools are we currently using across scheduling, billing, data collection, and payroll?
- Do these systems integrate seamlessly, or are we manually transferring information?
- How often do staff log in to multiple platforms to complete one workflow?
- Are there redundant systems we're maintaining unnecessarily?

EFFICIENCY

- What daily or weekly tasks feel repetitive or manual?
- Where are bottlenecks occurring in workflows?
- How long does it take to complete key processes?
- Are staff spending time on work that could be automated?
- How much time could be saved with better system design?

COST

- What is our total monthly/annual spend across all systems?
- Are there hidden costs?
- How much revenue are we losing due to inefficiencies or errors?
- Are we paying for multiple tools that could be consolidated?
- Does the value we're getting justify the cost?

FEATURES

- What essential features are missing or underperforming?
- Are there workarounds staff rely on to get things done?
- Does the system support both clinical and administrative needs?
- Are there features we're paying for but not using?

GROWTH

- Can our current system scale with more clients, staff, and locations?
- Will we need to upgrade tiers or add costly features as we grow?
- How easy is it to onboard and train new staff?
- Does the system provide visibility into key metrics for scaling?
- Are current limitations forcing us to delay growth plans?

ERRORS

- Where do mistakes happen most frequently?
- How often do errors require rework or corrections?
- Are errors caused by human input, system limitation, or lack of integration?
- What is the financial impact of these errors?
- Do we have a reliable way to track and audit errors?

EVALUATING ABA SOFTWARE SOLUTIONS

Define Your Goals

Writing down your goals for a software platform is a valuable way to hone in on the needs that are most important to your practice. After completing the checklist, use this statement to clarify the biggest improvements you want a new system to support:

YOUR STARTER STATEMENT

“We want to **eliminate** _____ and **gain better visibility** into _____.”

EXAMPLES

“eliminate manual billing errors”
“gain real-time insight into staff productivity”

“eliminate time spent manually tracking authorizations”
“gain clearer insight into clinical and operational performance”

Having clear goals helps you focus on the most important features as you search for the best-fit solution.

The best software decisions start with understanding where your team is losing time, duplicating work, or relying on disconnected systems.



EVALUATING ABA SOFTWARE SOLUTIONS

Step 2: What to Look for in a New Platform

Core Requirements

A strong platform should:

- **Be truly all-in-one** — not fragmented or tier-gated
- **Offer intuitive workflows** for both admin and clinical staff
- **Include all features upfront** — no hidden upgrades
- **Scale** without retraining or add-ons

Support & onboarding

A platform is only as good as the support behind it. Look for:

- Dedicated onboarding specialists
- Live chat or real time support
- Help center and tutorials
- Ongoing customer success guidance

Pricing & Contracts: What to watch for

Factor	Look For	Red Flags
Pricing	Transparent, predictable	Hidden fees, add-ons
Features	Included from the start	Locked behind tiers
Contracts	Monthly flexibility	Long-term lock-ins
Scaling	No pricing spikes	Cost jumps with growth

EVALUATING ABA SOFTWARE SOLUTIONS

Vendor Evaluation Scorecard

Use this to compare platforms side by side. Score each vendor per question, then use your totals—alongside your defined goals—to guide your final decision.

SCORING: 2 YES 1 PARTIAL 0 NO

Question	Vendor A	Vendor B	Vendor C
Does the platform include all the features you need daily?	<input type="text"/>	<input type="text"/>	<input type="text"/>
Is there a risk-free trial with no credit card required?	<input type="text"/>	<input type="text"/>	<input type="text"/>
Can you access the trial immediately?	<input type="text"/>	<input type="text"/>	<input type="text"/>
Is full functionality available to you during the trial?	<input type="text"/>	<input type="text"/>	<input type="text"/>
Do you receive dedicated support during onboarding?	<input type="text"/>	<input type="text"/>	<input type="text"/>
Will support continue after you become a customer?	<input type="text"/>	<input type="text"/>	<input type="text"/>
Is pricing transparent and all-inclusive?	<input type="text"/>	<input type="text"/>	<input type="text"/>
Can the platform scale with your practice?	<input type="text"/>	<input type="text"/>	<input type="text"/>
Are there no long-term contracts?	<input type="text"/>	<input type="text"/>	<input type="text"/>
Is the interface intuitive for all staff roles?	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Score (out of 20)	<input type="text"/>	<input type="text"/>	<input type="text"/>

NAVIGATING FREE TRIALS


Step 3: Evaluate Through a Free Trial

A demo is not enough. To determine the best fit for your ABA practice, you need to experience real usage with a trial of the platform.

What a good trial looks like

- Full feature access
- Not a generic demo or sandbox / testing account
- No credit card required
- No contract commitment
- Immediate access, no long sales cycle
- Hands-on support during the trial

A software trial should help your team test real workflows— not just click through a polished demo.



How to get the most out of your software trial

WEEK 1 Initial Setup

- Add staff and clients
- Configure permissions
- Explore navigation

WEEK 2 Foundations

- Build schedules
- Test workflows
- Review user experience

WEEK 3 Data Input

- Enter session data
- Test clinical workflows
- Validate reporting accuracy

WEEK 4 Billing & Operations

- Run billing cycles
- Test payroll workflows
- Evaluate reporting outputs

NAVIGATING FREE TRIALS

Step 4: Making a Final Decision

Most ABA practices compare and contrast a few software providers before making a final decision. It can be a time consuming process, because platforms differ in pricing models, features, implementation and support. Use this chart to guide your final decision.

Evaluation Area	What Buyers Should Look for
Pricing & Contract Flexibility	Transparent pricing, onboarding costs, contract length, cancellation terms, scalability pricing, and hidden fees
Workflow Integration	Whether scheduling, billing, documentation, payroll, and EVV work together in one connected system
Ease of Use for Staff	Simple, intuitive workflows for RBTs, BCBA's, schedulers, and billing teams — especially on mobile devices
Authorization & EVV Capabilities	Authorization tracking, claims workflows, built-in EVV, mobile visit verification, and operational reporting
Support & Scalability	Responsive customer support, implementation assistance, staff training resources, and ability to support organizational growth

The right platform should make your operations feel simpler, more connected, and easier for your team to manage every day.





Planning & Executing Your Transition

HOW TO CHOOSE YOUR TRANSITION APPROACH

Step 5: Choose Your Transition Strategy

There's no single "right" approach to switching ABA practice management platforms. The best software transition strategy depends on your team's capacity, comfort with change, and how complex your current workflows are.

Below are the two most common strategies people use— along with when each one tends to work best.

OPTION 1

“Rip the Band-Aid Off”

A full, immediate switch from your current system to the new platform on a specific go-live date. After that point, all scheduling, data collection, billing and documentation happen exclusively in the new system.

WHAT TO EXPECT

- Short implementation timeline
- One clear cutover date
- No overlap between old and new systems
- Requires upfront preparation and training

PROS

- Faster adoption across the entire team
- No confusion about which system to use
- Eliminates duplicate work immediately
- Quicker return on investment

CONSIDERATIONS

- Can feel overwhelming without proper training
- Higher short-term pressure on staff
- Less room for gradual adjustment

BEST FOR PRACTICES THAT:

- Have smaller or more agile teams
- Are switching from manual systems or highly inefficient tools
- Have completed a thorough free trial with hands-on staff experience
- Prefer to move quickly and avoid prolonged transitions



HOW TO CHOOSE YOUR TRANSITION APPROACH

OPTION 2

Phased Rollout

A gradual transition where different parts of your operations (or different teams) move to the new platform over time.

Examples: rollout by location or team, or pilot with a small group before scaling.

WHAT TO EXPECT

- Longer implementation timeline
- Temporary overlap between systems
- Incremental adoption across teams

PROS

- Lower immediate risk
- More time for staff to adjust
- Easier to troubleshoot in smaller stages
- Less disruptive to daily operations

CONSIDERATIONS

- Requires careful coordination and planning
- May involve duplicate work during transition
- Slower time to full efficiency
- Potential confusion if workflows aren't clearly defined

BEST FOR PRACTICES THAT:

- Have larger or more complex organization
- Are concerned about disrupting client services
- Have staff resistance to change
- Need more time for training and process alignment

There's no wrong choice. Both approaches can be successful when planned well. What matters most is not which strategy you choose, but how clearly you communicate it, how well you prepare your team, and how much support you provide along the way.

HOW TO CHOOSE YOUR TRANSITION APPROACH

How to decide what's right for your practice

If you're unsure which path to take, start with these questions:

- How comfortable is our team with rapid change?
- Do we have time for thorough upfront training?
- Are our current systems causing urgent issues?
- Can we manage temporary duplicate workflows?

Side-by-Side Comparison

Factor	"Rip the Band-Aid Off"	Phased Rollout
Timeline	Short	Longer
Risk Level	Higher upfront	Lower, spread out
Staff Adjustment	Rapid	Gradual
Operational Disruption	Short-term spike	Lower, extended
Efficiency Gains	Immediate	Delayed
Planning Complexity	Moderate	High

Choose "Rip the band-aid" off if

Speed, simplicity, and immediate improvements are your priorities— and your team is ready.

Choose a Phased Rollout if

Stability, risk reduction, and gradual adoption are more important.

MAKING THE SWITCH

Step 6: Prepare Your Team for the Transition

Identify Your Transition Stakeholders

Decide who needs to be involved in executing the switch. Be sure you have representatives that can evaluate and lead from the clinical, operations, and financial perspectives of your ABA practice.

Ensure key stakeholders:

- Are aligned on the transition approach and timelines
- Have clearly defined roles during the rollout
- Serve as go-to contacts for their respective teams

Build Your Transition Plan & Timeline

Once you've selected your transition approach, design your plan. Set key dates and milestones, assign owners, and make sure your team knows what to expect at every stage.

SAMPLE TRANSITION TIMELINES

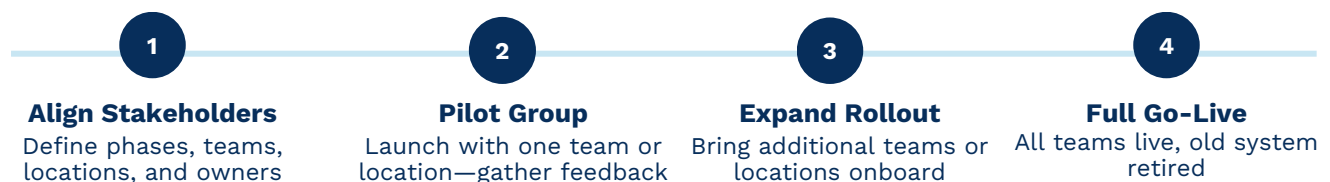
"Rip the Band-Aid Off"

Typical Timeline: 4-6 weeks



Phased Rollout

Typical Timeline: 3-4 months



MAKING THE SWITCH

Use “Idea Pods” for Smoother Adoption

Breaking staff into small, focused groups can help ABA practices reduce overwhelm, improve buy-in, and catch workflow issues early during a software transition. These pods create smaller support systems inside the organization so staff are not trying to learn everything at once.

BETA POD Early Adopters

Early adopters who test the system and surface issues before full rollout.

HOW TO IMPLEMENT

- Select 3-5 tech-savvy teammates across various functions
- Provide early access
- Document issues and create FAQs
- Support peers during launch week

SUPPORT POD Change Champions

Helps hesitant staff build confidence with new workflows.

HOW TO IMPLEMENT

- Pair hesitant staff with confident users
- Prioritize small wins over full mastery
- Keep sessions short and practical
- Celebrate wins

UP-LEVEL POD Quality Control

A BCBA-led group that keeps data and operations accurate during transition.

HOW TO IMPLEMENT

- Hold weekly 30-min check-ins
- Review scheduled vs. completed sessions
- Flag missing notes and billing gaps
- Address recurring issues early

Simple Implementation Tips for Transition Pods

- Keep pod groups small and approachable
- Assign one clear purpose to each pod
- Meet briefly but consistently during rollout
- Encourage feedback early before frustration builds
- Recognize staff who help improve adoption
- Focus on practice workflows, not technical jargon

MAKING THE SWITCH

Communication Plan

How and when you communicate a new software platform to staff has an effect on their level of awareness and cooperation— items that are vital to the overall success of the transition.

Communication best practices

- Announce early and clearly
- Set expectations
- Provide training resources
- Assign a go-to support person

Set clear expectations around

- Training dates
- Beta testing or pod rollout dates
- When staff should stop using old systems
- Official launch / go-live date
- Deadlines for completing onboarding or training tasks

SAMPLE INTERNAL ANNOUNCEMENT

Subject: Upcoming Transition to New Practice Management System

Hi team,

Over the next few weeks, we'll be transitioning to a new all-in-one practice management system to simplify scheduling, billing, and our day-to-day workflows.

Our goal is to reduce administrative work, improve accuracy, and make everyone's job easier.

You'll receive training tailored to your role, and we'll support you every step of the way. Please reach out with any questions as we move through the process.

Thank you for your flexibility and support during this transition.

A good software partner will arrange training and make it easy for staff to attend group or personalized sessions so they are confident in the system. It is also helpful to set designated contacts, both internally and through the software platform, to help guide the new implementation. Make sure staff are clear on where they should go with questions.

MAKING THE SWITCH

Pre-Launch Worksheet

Our transition approach

Rip the Band-Aid Off

Phased Rollout

PRE-LAUNCH ACTION ITEMS

- Transition strategy confirmed
- Stakeholders identified and roles assigned
- Timeline and key dates set
- Staff trained by role
- Internal announcement set
- Data migrated and verified
- FAQs and resources shared with staff
- Support contacts established
- Trial insights incorporated into final setup
- Old system retirement date confirmed

KEY DATES & MILESTONES

Milestone	Owner	Date

DESIGNATED CONTACTS

Role	Name
Internal champion	
Software contact	
Staff go-to for questions	
Billing lead	
Clinical lead	

KNOWN RISKS OR OPEN ISSUES BEFORE GO-LIVE

.....

.....

.....

Are we ready to go live?

Yes Not Yet

If not yet, what needs to happen first?

A successful transition will free up time, reduce stress, and allow your team to focus on what matters most: delivering high-quality client care.

Ready to Make the Switch?

Office Puzzle is a true all-in-one ABA practice management platform built to simplify your operations, reduce administrative burden, and support your team from day one. We don't just hand you software— we partner with you through every stage of your transition.



- ✓ All features included
- ✓ Hands-on onboarding support
- ✓ 30-day trial— no credit card required
- ✓ No long-term contracts

GET STARTED